



CALHEERS UPDATE

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**November 19, 2012
Stakeholder Advisory Committee**

CalHEERS Status

- Design phase has begun
- Key Dates for Stakeholder Comments:
 - November: Release Draft System Requirements
 - Nov. 16 – Posted to Exchange Website
 - Nov. 30 – Comments due
 - December: Release Business Services Definition
 - January: Release Application with Data Elements
 - December – March: Additional activities on Usability

CalHEERS Status

- CalHEERS will be released in three phases:
 - July 2013: Portal
 - October 2013: Open Enrollment
 - January 2014: Financial Management
- Contents of each Release displayed on next slide

CalHEERS Releases

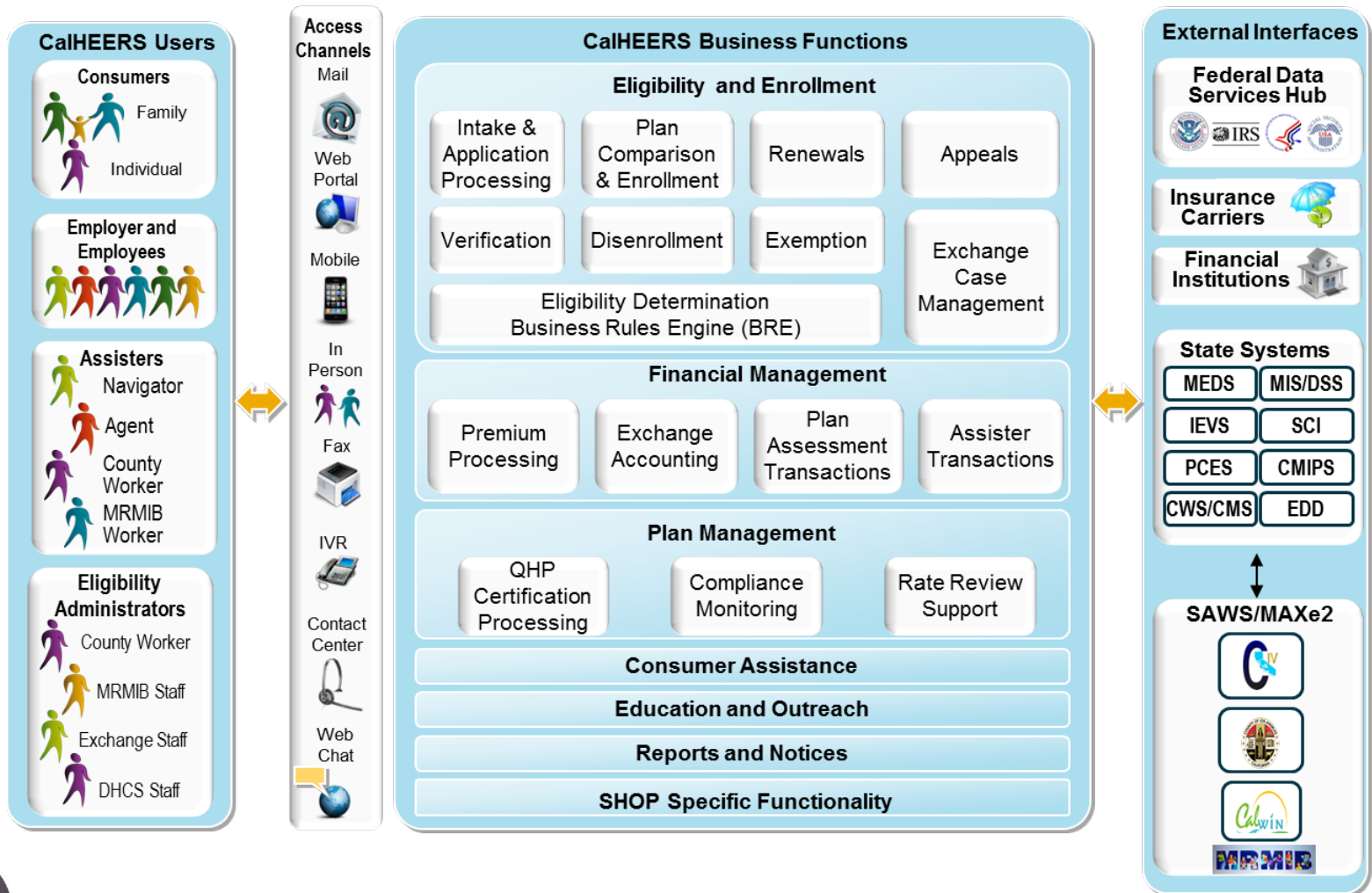
Functional Releases	Key Functions	Function Description
Release 1 July 2013	Portal	<ul style="list-style-type: none">• Shop and Compare Tools• Plan Offerings• Assister Registration• SHOP Employer Registration and Setup• Web Portal Online Help
Release 2 September 2013	Eligibility and Enrollment	<ul style="list-style-type: none">• Eligibility and Enrollment (Individual and SHOP)• Notices• Premium• Plan and Benefits Assistance
Release 3 January 2014	Financial Management	<ul style="list-style-type: none">• Financial Management• Plan Management• Reporting• Education and Outreach Reports



CalHEERS Functions

SHOP	Plan Management	Eligibility & Enrollment
<ul style="list-style-type: none"> • Employer registration • Plan selection & contribution • Employee application 	<ul style="list-style-type: none"> • Certification • Operational data • Rate review • Compliance • Provider / Plan Directory 	<ul style="list-style-type: none"> • Portal access channel • Verification • Plan browsing & selection • Eligibility determination • Business rules • Case management • Notices of Action • Plan enrollment • Plan disenrollment • Administrative renewal • Change processing • Exemptions • Administrative appeals
Financial Management	Reporting	
<ul style="list-style-type: none"> • Premium processing • Accounting • Assister financial transactions • Plan assessment fees 	<ul style="list-style-type: none"> • Financial Management • Plan Management • Consumer Assistance • Education & Outreach • SHOP 	
Consumer Assistance	Outreach and Education	
<ul style="list-style-type: none"> • Assister registration • Assister management • SHOP • Plan & benefit assistance • Online portal help 	<ul style="list-style-type: none"> • Reporting and Tracking • Surveys 	

CalHEERS Business Function Overview



Typical Individual Consumer Process

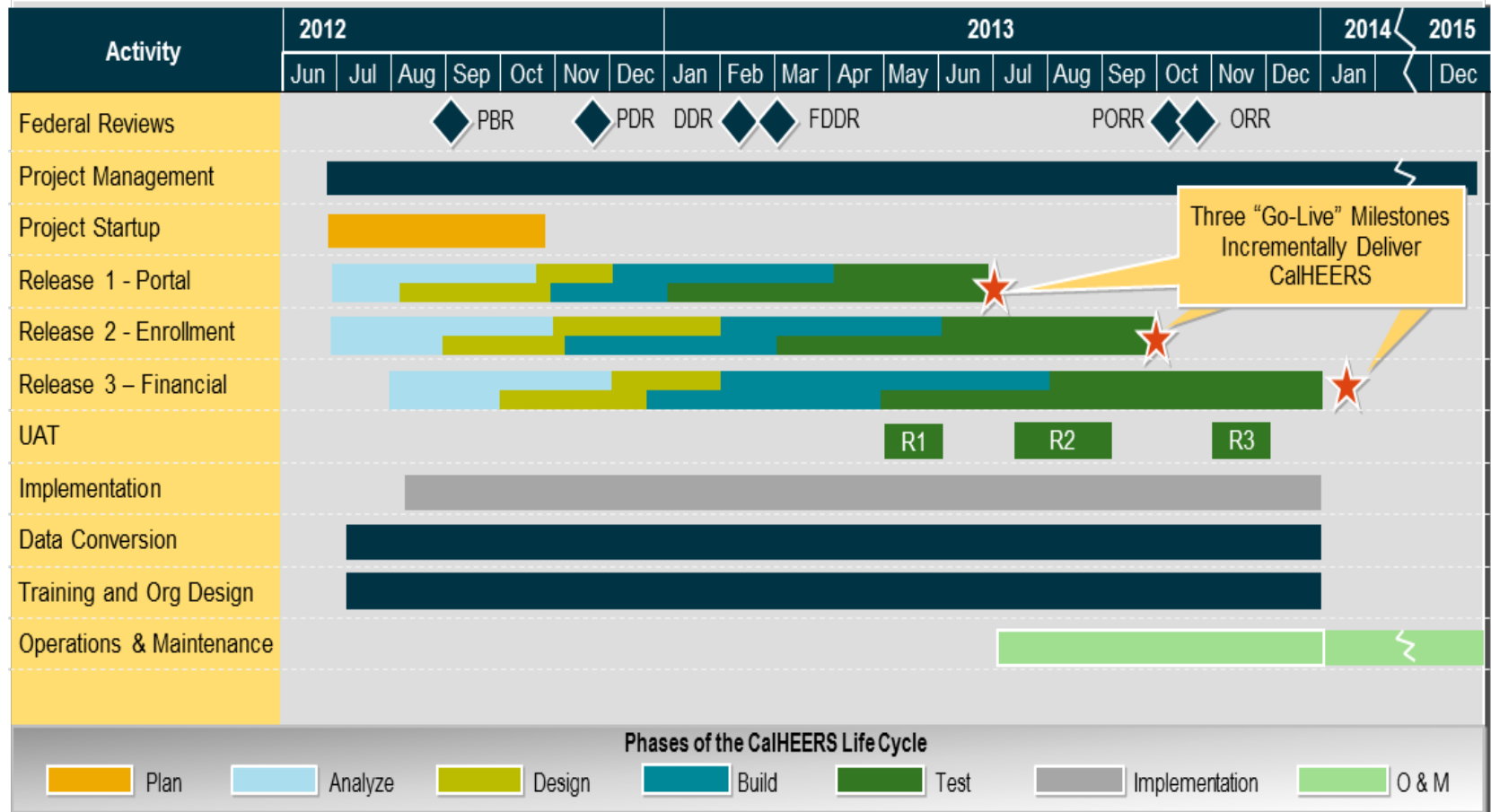
- **Two Primary Access Channels: CalHEERS Consumer Portal and Service Center**

- Set up account
- Identify household members (mother, father, child)
- Request consideration for health subsidy
- Enter income and other required information (both parents working)
- Income information is verified on Federal Data Services Hub
- Result: Household qualifies for subsidy (advanced premium tax credit)
- Confirm which family members are enrolling in health insurance
- Compare and select health plans
- Enroll each household member into the selected health plan(s)

Follow-up Processing

- CalHEERS sends information to carrier(s) for fulfillment
- CalHEERS generates notice to members
- Carriers contact members for premium payment
- Members pay premium to carriers
- Carriers send out ID cards and enrollment fulfillment kits to members
- Members can begin accessing health care network after insurance effective date

CalHEERS Schedule



For More Information:

Visit our website at
<http://www.hbex.ca.gov>

And join our listserv